

Go with the Flow—Sheet!



Our Mission: To protect and improve the health and environment of all Kansans.

Go with the Flow—Sheet!

The screenshot displays the 'Client Services .NET' application window for 'Butler County WIC Clinic'. The main window is titled 'Monalisa M Schreffler Group'. On the left, a sidebar lists 'Quick Links for Monalisa M Schreffler' including Demographics, Flowsheet, Notes, WIC Certification, Dual Participation, Anthrop Measures, Blood Measures, Health Interview, Risk Factors, Nutrition Education, Referrals, Change Due Date, Record End of PG, History-Client Goals, History-Health Interview, History-Insurance, History-Nutrition Education, Rights & Responsibilities, Check Pickup, and Sign for Checks. The 'Flowsheet' tab is selected, showing a table with columns for months from June 2014 to February 2015. A dropdown menu is open for June 2014, showing options like 'New Certification', 'Nutrition Ed +', 'Nutrition Ed Individual', and 'Recertification'. The top right of the window shows client details: 'Monalisa M Schreffler', 'DOB: 03/26/1994', 'Gender: Female', 'WIC Category: PG', 'Cert. Period: 06/17/2014 to 12/31/2014', 'Due Date: 11/01/2014', and 'Priority: 1'. There are 'Save' and 'Cancel' buttons at the bottom right of the flowsheet area.

Our Mission: To protect and improve the health and environment of all Kansans.



The Flowsheet is a valuable tool found in the KWIC system to help staff develop a plan for providing WIC services to their clients. In this training, we will explore why you should regularly use the flowsheet; how to set up the flowsheet for individual clients, families, and how to coordinate needed services with staff schedules and check distribution.

Why Use the Flowsheet?

1. Plan of care
2. Coordinate Family Appointments
3. Schedule needed visits for:
 - Nutrition Education or Follow Up Checks
 - Mid-Certification/Recertification Appointments
4. Document plan required by Federal/State policy

Our Mission: To protect and improve the health and environment of all Kansans.



The flowsheet is your documentation of a **plan of care** for each WIC client. Similar to a hospital or clinical medical record, **WIC also requires that a plan of care be developed for each WIC client.** This plan outlines what the WIC staff person has determined is necessary to provide quality service to the client during their time on WIC. When the flowsheet is completed, all staff know what the plan of care for the client is—when the next appointment needs to be scheduled and what type of appointment it is to be.

State policy requires that documentation be included in the WIC client record that appointments were planned and offered to meet the needed requirements for nutrition education, check pick up, and certification appointments. **The flowsheet provides documentation that a plan was formed and appointments will be offered using this plan.**

The flowsheet can also assist families. WIC staff can use the flowsheet to **coordinate the needed appointments for all members in the family and thus reduce the number of times a family may need to come to the clinic.** This helps both the family and WIC staff use their time more efficiently at each encounter.

Certification Time Frames

- Pregnant Women: Until delivery
- Breastfeeding Women: Up to the baby's first birthday
- Non-breastfeeding postpartum women: Until the baby is six months old
- Infants: Up to the infant's first birthday
- Children 1-5 years: One year certification

Our Mission: To protect and improve the health and environment of all Kansans.



So how does the flowsheet work? Well, you have to start with the client. When a client is certified on WIC, they will be on the program for a certain amount of time before being certified again:

For pregnant women—until delivery

For postpartum women who breastfeed—up to the baby's first birthday

For postpartum women who choose not to breastfeed—until the baby is six months old

For infants—up to their first birthday

For children 1-5—up to one year

Flowsheet Choices

DOB 03/26/1994, 20 Years Priority 1

Flowsheet	Notices
Monalisa M	Monalisa M

Monalisa
 DOB 03/26/1994
 WIC Category PG
 Elig. End 12/31/2014

Month	Appointment Type
June, 2014	New Certification
July, 2014	Breastfeeding Peer Counselor
August, 2014	Check Pickup Class
September, 2014	Complete Certification
October, 2014	Follow Up
November, 2014	High Risk (RD)
December, 2014	Mid-Certification
January, 2015	New Certification
February, 2015	none
	Nutrition Ed +
	Nutrition Ed Individual
	Presume Eligible
	Recertification
	Transfer from In State
	Transfer from Out of State
	Transfer Out
	Second Contact

Our Mission: To protect and improve the health and environment of all Kansans.



The flowsheet provides you with several choices or appointment types to use in setting up your plan of care for the client.

The choices used most often will be the new certification, midcertification, recertification, and those related to nutrition education—Nutrition Ed +, Nutrition Ed Individual, High Risk (RD) and class.

Other options such as Follow Up would be used if a client does not provide all proofs at the certification appointment. The transfer appointment types would be used if you made a specific appointment for clients who are transferring into your clinic or who need to have a VOC card printed for transferring out of state. If your clinic has a Breastfeeding Peer Counselor, you might choose this appointment type when a woman will be meeting with the counselor in your clinic.

Complete certification would be used very rarely—it is only used if a client was Presumed Eligible and then returns to complete their certification appointment. To learn more about Presume Eligible and the rules for its use, see Policy: CRT 03.05.00 Presumptive Eligibility Appointments for Pregnant Women.

How to best set up a Flowsheet

- ✓ **Certify the client**
- ✓ **When is the next recertification appointment?**
- ✓ **When is the next midcertification appointment?**
- ✓ **What type of nutrition education do they need?**
- ✓ **When is the nutrition education available?**
- ✓ **What type of appointment is needed besides nutrition education?**
- ✓ **Does this flowsheet need to coordinate with other family member WIC visits?**

Our Mission: To protect and improve the health and environment of all Kansans.



At the end of the certification process, setting up the flowsheet or plan of care should be the next step before issuing checks.

Things to consider are:

1. When should the next recertification be scheduled?
2. Is the client an infant, breastfeeding woman or child who will need a mid-certification? When should this be scheduled?
3. What type of nutrition education will the client need—low risk secondary education or high risk nutrition education?
4. When is the nutrition education available—is the dietitian doing high risk only in the clinic on certain months? Is there an interactive nutrition education center or class that meets the needs of the client who is not high risk?
5. Will other appointments be needed—follow up, check pick up, etc.?
6. Does the flowsheet need to coordinate with other family members' WIC visits?

All of these are questions to answer when completing the flowsheet. Remember to plan for the entire certification period but no longer.

Example 1

Client Services NET - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book Monalisa M Schreffler Group

Group Members
Monalisa M Schreffler
Hide Inactive Clients
Add New Group Member

Quick Links for Monalisa M Schreffler
Demographics
Flowsheet
Notes
Notes
WIC Certification
Due Participation
Anthro Measures
Blood Measures
Health Interview
Risk Factors
Nutrition Education
Referrals
Change Due Date
Record End of PG
History-Client Goals
History-Health Interview
History-Insurance
History-Nutrition Education
Rights & Responsibilities
Check Pickup
Sign for Checks

Monalisa M Schreffler
10358661 Gender Female
DOB 03/26/1994 20 Years
WIC Active PG
Cert. Period 06/17/2014 to 12/31/2014
Due Date 11/01/2014
Priority 1

Flowsheet 0
Monalisa M Schreffler

Monalisa
DOB 03/26/1994
WIC Category PG
Exp. End 12/31/2014

Date	Action
June, 2014	New Certification
July, 2014	
August, 2014	
September, 2014	
October, 2014	
November, 2014	Recertification
December, 2014	
January, 2015	
February, 2015	

Add

Save Cancel

Our Mission: To protect and improve the health and environment of all Kansans.



So, let's see how this would work. Monalisa is a pregnant woman who has come in to be certified on WIC. You are certifying Monalisa in June 2014. You find that she is due to deliver in November 2014 and she is low risk.

Now let's set up her flowsheet. Since you are certifying her in June, choose new certification next to the June 2014 line. You know that she is due in November, so choose recertification next to the November 2014 line.

Example 1

Our Mission: To protect and improve the health and environment of all Kansans.



Between Monalisa’s new certification and recertification, she will need at least one nutrition education contact. Because she is low risk, plan on scheduling her for a Nutrition Education + (NE+) visit. In addition, your clinic has a policy to bring all pregnant women in for an individual education visit the month before their due date to discuss breastfeeding and provide information for her next visit with the new infant. Your choice to schedule these two visits are NE+ in August and the Nutrition Education Individual (NEI) in October.

You may have noticed that we did not add any appointments for check pickup. That is because the KWIC system assumes that checks will be provided whenever another appointment occurs. Check pickup as a choice on the flowsheet should be used very seldom. The incentive for Monalisa to return in August and October for her nutrition education appointments is to receive nutrition education and more WIC checks. Monalisa should only be given two months of checks in June and receive more checks in August when she returns for her NE+ appointment.

At this point, your Flowsheet for Monalisa is complete. Don’t forget to “Save” when you have finished. Now that the flow sheet (plan of care) is complete, everyone knows by looking at the flowsheet when Monalisa should be scheduled for future appointments and can determine how many months of checks to print.

Example 2

Client Services WIC Client Appointment Book

Group Members: Lori Lima, Lance Lima

Appointment Book: Lima Lima Group

WIC Client: Lori Lima
DOB: 08/02/2013, 5 Years 9 Months
Priority: 3 (H)

WIC Client: Lance Lima
DOB: 08/02/2013, 5 Years 9 Months
Priority: 3 (H)

Month	Lori (DOB: 08/02/2013)	Lance (DOB: 08/02/2013)
August, 2013	Check Pickup	Check Pickup
September, 2013	High Risk (RD)	High Risk (RD)
October, 2013	High Risk (RD)	High Risk (RD)
November, 2013	High Risk (RD)	High Risk (RD)
December, 2013	High Risk (RD)	High Risk (RD)
January, 2014	Recertification	Recertification
February, 2014	Recertification	Recertification
March, 2014	Recertification	Recertification
April, 2014	Recertification	Recertification
May, 2014	Recertification	Recertification
June, 2014	Recertification	Recertification
July, 2014	Recertification	Recertification
August, 2014	Recertification	Recertification
September, 2014	Recertification	Recertification
October, 2014	Recertification	Recertification
November, 2014	Recertification	Recertification
December, 2014	Recertification	Recertification
January, 2015	Recertification	Recertification
February, 2015	Recertification	Recertification
March, 2015	Recertification	Recertification
April, 2015	Recertification	Recertification
May, 2015	Recertification	Recertification
June, 2015	Recertification	Recertification
July, 2015	Recertification	Recertification
August, 2015	Recertification	Recertification
September, 2015	Recertification	Recertification
October, 2015	Recertification	Recertification

Our Mission: To protect and improve the health and environment of all Kansans.



One of the advantages of the flowsheet is that it allows WIC staff to better coordinate appointments for families with more than one person on WIC. Let's set up a flowsheet for the Lima family. Lori and Lance are children who have returned to your clinic to be recertified. They are in your clinic for recertification in October 2014. When Lori is certified, she is found to be low risk. Lance is certified and is high risk with a low hemoglobin. Now let's set up their plan of care on the flowsheet.

Example 2

7.41.2.1 Butler County WIC Clinic

Check Records | Client History | Appointments | Reports | Help

Appointment Book | Lisa Lima Group

Lance Lima
10357986, Gender Male
DOB 01/02/2013, 1 Years 9 Months
FlowSheet |

WIC Active: C
Cert. Period 09/14/2014 to 09/31/2015
Priority: 2

	Low DOB 11/19/1988 WIC Category BP Upd. End 2/21/2013	Low DOB 05/09/2011 WIC Category C Upd. End 08/31/2015	Lance DOB 01/02/2013 WIC Category C Upd. End 10/31/2015
August, 2013	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
September, 2013	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
October, 2013	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
November, 2013	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
December, 2013	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
January, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
February, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
March, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
April, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
May, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
June, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
July, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
August, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
September, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
October, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
November, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
December, 2014	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
January, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
February, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
March, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
April, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
May, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
June, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
July, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
August, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
September, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>
October, 2015	<input type="text" value="23"/>	<input type="text" value="23"/>	<input type="text" value="23"/>

Our Mission: To protect and improve the health and environment of all Kansans.



Next, we need to set up the appointments for nutrition education. Kansas WIC policy requires that each child have two nutrition education visits during the year—one before their midcertification and another after the midcertification visit. These visits should reflect the nutritional risk level identified at the certification. In this example, we know that Lori is low risk and Lance is high risk.

Lori will need either an NE+ or Nutrition Education Individual appointment. The NE+ may be completed through a class, self study notebook, use of WIChealth.org, or an interactive nutrition education center. The NEI is a face-to-face contact provided by CPAs (RN or RD usually) on a topic appropriate to the client.

The high risk (RD) appointment required by Lance, must be completed by the registered dietitian. In your clinic, the registered dietitian comes in the odd numbered months. With this in mind, you set up an RD (high risk) appointment for Lance in January and again in July to see the dietitian. The dietitian can also visit with the mother about Lori at a low risk individual nutrition education contact (NEI).

At this point, you have completed the flowsheet for the family. Be sure to “Save” your changes.

Example 2

The screenshot displays the Butler County WIC Clinic Appointment Book and Scheduler interface. The Appointment Book shows a grid of time slots (07:30 AM to 12:00 PM) and appointment types (NEI, RD, BPC, C, and another C). The Scheduler panel on the right shows the date 01/06/2015 (Friday) and a list of clients. Two red arrows point to 'Client Lori Lima' and 'Client Lance Lima' in the client list. The Scheduler also shows appointment details for 'Client Lori Lima' and 'Client Lance Lima', including appointment type, outcome, and category.

Our Mission: To protect and improve the health and environment of all Kansans.



When it comes time to make the next appointment for the Lima family, the appointment book will automatically default the appointment type to the next contact shown on the flowsheet. When staff make an appointment for the family to return in January, and the “Make New Appointment” button is pressed, the appointment book fills in that Lori needs an NEI appointment and Lance needs to see the RD.

Example 3

Client Services .NET 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book Casey F Steenbock Group

Group Members

- Casey F Steenbock
- Jennae L Steenbock
- ☐ Hide Inactive Clients
- Add New Group Member

Quick Links for Jennae L Steenbock

- Demographics
- Flowsheet
- Notes
- WIC Certification
- Mid-Certification
- Dual Participation
- Anthro Measures
- Blood Measures
- Health Interview
- Risk Factors
- Nutrition Education
- Referrals
- Immunizations
- History-Client Goals
- History-Health Interview
- History-Issuance
- History-Nutrition Education
- Rights & Responsibilities
- Check Pickup
- Sign for Checks

Jennae L Steenbock
11383350 Gender Female
DOB 06/27/2012 2 Years 3 Months
Flowsheet [X] Notices to Jennae L

Casey F Steenbock
DOB 04/02/1982
WIC Category PP
Sig. End 12/31/2012

Jennae L Steenbock
DOB 06/27/2012
WIC Category C
Sig. End 2/28/2015

Month	Day	Event
May, 2014		Transfer from In State
June, 2014		
July, 2014		
August, 2014		Recertification
September, 2014		
October, 2014		
November, 2014		Nutrition Ed +
December, 2014		
January, 2015		Mid-Certification
February, 2015		
March, 2015		
April, 2015		
May, 2015		Nutrition Ed +
June, 2015		
July, 2015		
August, 2015		Recertification

Our Mission: To protect and improve the health and environment of all Kansans.



It is important to remember that the flowsheet is a **Plan** for care, not an absolute. If circumstances change, the flowsheet can also be changed to accommodate the new needs of the family or the clinic. Let's go through one such scenario.

Casey Steenbock's daughter Jennae is on WIC in your clinic. She was recertified in August and you set up her flowsheet at that time. A couple of weeks later, Casey calls the clinic and states that she is pregnant and wants to get back on WIC. You make an appointment to certify Casey in September. At that appointment, you determine that her due date is January 10, 2015. How would you set up the flowsheet for Casey to coordinate appointments with those for Jennae?

Example 3

Client Services.NET - 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Insurance Clinic Admin Utilities Reports Help

Find Client Appointment Book Casey F. Steenbock Group

Group Members

Casey F. Steenbock

Jennae L. Steenbock

Hide Inactive Clients

Add New Group Member

Quick Links for Jennae L. Steenbock

Demographics

Flowsheet

Notices

Notes

WIC Certification

Mid-Certification

Dual Participation

Antenatal Measures

Blood Measures

Health Interview

Risk Factors

Nutrition Education

Referrals

Immunizations

History-Client Goals

History-Health Interview

History-Insurance

History-Nutrition Education

Rights & Responsibilities

Check Pickup

Sign for Checks

Jennae L. Steenbock

11383358 Gender Female

DOB 06/27/2012 2 Years 3 Months

WIC Active C

Cert. Period 08/07/2014 to 02/28/2015

Priority 5

Flowsheet 0

Notices 0

Jennae L.

Casey

DOB 04/02/1983

WIC Category PP

Elig. End 12/31/2012

Jennae

DOB 06/27/2012

WIC Category C

Elig. End 2/28/2015

Month	Casey	Jennae
May, 2014		Transfer from In Stat.
June, 2014		
July, 2014		
August, 2014		Recertification
September, 2014	Recertification	
October, 2014		
November, 2014	Nutrition Ed +	Nutrition Ed +
December, 2014		
January, 2015	Recertification	Mid-Certification
February, 2015		Check Pickup
March, 2015		
April, 2015		
May, 2015		Nutrition Ed +
June, 2015		
July, 2015		
August, 2015		Recertification

Our Mission: To protect and improve the health and environment of all Kansans.



One option is shown on this slide. You might decide to put both Jennae and Casey in a NE+ class on eating more fruits and vegetables in November. Because Casey is due January 10th, it is very likely that she will contact your clinic to schedule an appointment for herself and the new baby in January. With that in mind, you can plan on recertifying Casey in January 2015.

However, you will notice that normally, Jennae would have a midcertification in February. In this instance, you may decide to move Jennae's midcertification up to January. In that way, the family would only need to make one trip to the clinic and all three family members would be certified on the same day.

You will also notice that we added a check pick up date to Jennae's flowsheet. Because we moved Jennae's midcertification from February to January, we needed to add a check pick up to her flowsheet to make sure there were not too many months between her midcertification and her next scheduled nutrition education contact.

Depending on your clinic's policies regarding how frequently you see mothers and new babies during the first few months, you may need to change Jennae's flowsheet again to better coordinate with her mom and new sibling once Casey and the new infant are certified.

Example 3

Client Services.NET - 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book Casey F Steenbeck Group

Group Members
Casey F Steenbeck
Jennae L Steenbeck
Hide Inactive Clients
Add New Group Member

Quick Links for
Jennae L Steenbeck
Demographics
Flowsheet
Notices
Notes
WIC Certification
Mid-Certification
Dual Participation
Anthro Measures
Blood Measures
Health Interview
Risk Factors
Nutrition Education
Referrals
Immunizations
History-Client Goals
History-Health Interview
History-Issuance
History-Nutrition Education
Rights & Responsibilities
Check Pickup
Sign for Checks

Jennae L Steenbeck
11383350 Gender Female
DOB 06/27/2012 2 Years 3 Months
WIC Active C
Cert. Period 08/07/2014 to 02/2/2015
Priority 5

Flowsheet
Jennae L

	Casey DOB 04/02/1982 WIC Category PP Elig. End 12/31/2012	Jennae DOB 06/27/2012 WIC Category C Elig. End 2/28/2015
May, 2014	<input type="checkbox"/>	Transfer from In Stat. <input type="checkbox"/>
June, 2014	<input type="checkbox"/>	<input type="checkbox"/>
July, 2014	<input type="checkbox"/>	<input type="checkbox"/>
August, 2014	<input type="checkbox"/>	Recertification <input type="checkbox"/>
September, 2014	Recertification <input type="checkbox"/>	<input type="checkbox"/>
October, 2014	<input type="checkbox"/>	<input type="checkbox"/>
November, 2014	Nutrition Ed + <input type="checkbox"/>	Nutrition Ed + <input type="checkbox"/>
December, 2014	<input type="checkbox"/>	<input type="checkbox"/>
January, 2015	Recertification <input type="checkbox"/>	Mid-Certification <input type="checkbox"/>
February, 2015	<input type="checkbox"/>	Check Pickup <input type="checkbox"/>
March, 2015	<input type="checkbox"/>	<input type="checkbox"/>
April, 2015	<input type="checkbox"/>	<input type="checkbox"/>
May, 2015	<input type="checkbox"/>	Nutrition Ed + <input type="checkbox"/>
June, 2015	<input type="checkbox"/>	<input type="checkbox"/>
July, 2015	<input type="checkbox"/>	<input type="checkbox"/>
August, 2015	<input type="checkbox"/>	Recertification <input type="checkbox"/>

Our Mission: To protect and improve the health and environment of all Kansans.



If you choose to coordinate all of the family's appointments at one time, change the flowsheet to reflect the change in your plan of care.

Let's Practice

Client Services JET 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book **Connie Celery Group**

Group Members

Connie Celery
10358558 Gender Female
DOB 01/07/1995 19 Years
WIC Active BF
Cert. Period 09/05/2014 to 08/31/2015
Priority 1

Flowsheet [X] Wellness [X]
[X] [X]

Quick Links for Connie Celery

Demographics
Flowsheet
Notes
WIC Certification
Mid-Certification
Dual Participation
Antire Measures
Blood Measures
Health Interview
Risk Factors
Nutrition Education
Referrals
Change Category
Review New Pregnancy
History-Client Goals
History-Health Interview
History-Insurance
History-Nutrition Education
Rights & Responsibilities
Check Pickup
Sign for Checks

	Connie DOB 01/07/1995 WIC Category BF Up End 8/31/2015	Caleb DOB 08/23/2014 WIC Category I Up End 8/31/2015
March, 2014	New Certification	
April, 2014		
May, 2014	Nutrition Ed +	
June, 2014		
July, 2014	Check Pickup	
August, 2014		
September, 2014	Recertification	New Certification
October, 2014	Nutrition Ed Individual	Nutrition Ed Individual
November, 2014	Check Pickup	Check Pickup
December, 2014		
January, 2015	Check Pickup	Check Pickup
February, 2015	Mid-Certification	Mid-Certification
March, 2015		
April, 2015		
May, 2015		Nutrition Ed +
June, 2015		
July, 2015		
August, 2015	Recertification	Recertification

Our Mission: To protect and improve the health and environment of all Kansans.



So now it is your turn to test your knowledge about flowsheets. In this scenario, we have a breastfeeding mother and her new infant. Both were certified on the same day. Both mother and infant were low risk. On this slide, is the flowsheet that the clinic set up.

What's right about this flowsheet?

All family members were certified on the same day.

Nutrition education was scheduled for the family in the first 6 months of their certification.

What needs to be improved?

- The breastfeeding mom is certified for a full year but there are no nutrition education contacts set for after her midcertification appointment.
- The midcertification appointments for both mom and baby usually occur when the infant is between 6 and 10 months. The flowsheet set the midcertification appointment a month early.
- There are several check pick up appointments set on the flowsheet. Unless there is a reason why the family needs to come in more often, these appointments are not needed.

- Nutrition education appointments were set for 1 month after certification. If your clinic schedules moms and new babies to return in one month, be sure to give only one month of checks to the family as an incentive to return for more checks.

Let's Practice

Client Services .NET - 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book Connie Celery Group

Group Members
 Connie Celery
 Caleb Celery
 Hide Inactive Clients
 Add New Group Member

Quick Links for Connie Celery
 Demographics
 Flowsheet
 Notes
 WIC Certification
 Mid-Certification
 Dual Participation
 Anthro Measures
 Blood Measures
 Health Interview
 Risk Factors
 Nutrition Education
 Referrals
 Change Category
 Record New Pregnancy
 History-Client Goals
 History-Health Interview
 History-Issuance
 History-Nutrition Education
 Rights & Responsibilities
 Check Pickup
 Sign for Checks

Connie Celery
 10358558 Gender Female
 DOB 01/07/1995, 19 Years
 WIC Active BF
 Cert. Period 09/05/2014 to 08, Priority 1

Flowsheet 0
 Notes 0
 Alerts

	Connie DOB 01/07/1995 WIC Category BF Elig. End 8/31/2015	Caleb DOB 08/23/2014 WIC Category I Elig. End 8/31/2015
March, 2014	New Certification	
April, 2014		
May, 2014	Nutrition Ed +	
June, 2014		
July, 2014	Check Pickup	
August, 2014		
September, 2014	Recertification	New Certification
October, 2014		
November, 2014		
December, 2014		
January, 2015		
February, 2015		
March, 2015		
April, 2015		
May, 2015		
June, 2015		
July, 2015		
August, 2015		

Our Mission: To protect and improve the health and environment of all Kansans.



Now that you have seen several examples of different flowsheets, let's practice setting up a flowsheet for the Celery family. Connie and Caleb Celery have come to your clinic to be certified for WIC on September 5, 2014. Connie is a breastfeeding mother and Caleb is her first child. Connie has been in contact with your clinic's Breastfeeding Peer Counselor and is getting support for her breastfeeding from her. When you complete the certification, you find that both are low risk. Now let's set up their flowsheet.

Be sure to include:

Recertification and Midcertification appointments

Nutrition education appointments

Any additional appointments you feel are needed

After you finish the flowsheet for Connie and Caleb, compare your choices with those on the next slide. Remember, that your choices may differ slightly from those on the slide based upon how your clinic normally provides WIC services.

Let's Practice

Client Services AET - 1.2.42.123 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book Connie Celery Group

Group Members

Connie Celery

Caleb Celery

DOB 08/23/2014 1 Months

WIC Active 1

Priority 2

FlowSheet B

Connie

DOB 03/07/1995

WIC Category BF

Exp. End 8/31/2015

Caleb

DOB 08/23/2014

WIC Category 1

Exp. End 8/31/2015

Month	Connie	Caleb
March, 2014	New Certification	
April, 2014		
May, 2014	Nutrition Ed +	
June, 2014		
July, 2014	Check Pickup	
August, 2014		
September, 2014	Recertification	New Certification
October, 2014		
November, 2014		
December, 2014		
January, 2015		
February, 2015		
March, 2015	Mid-Certification	Mid-Certification
April, 2015		
May, 2015		
June, 2015		
July, 2015		
August, 2015		Recertification
September, 2015		

Our Mission: To protect and improve the health and environment of all Kansans.



Here is one option for the flowsheet for Connie and Caleb. Connie and Caleb were certified in September 2014, so you begin by putting in the Recertification for Connie and New Certification for Caleb. Because Connie is breastfeeding, both she and Caleb will need a midcertification appointment when Caleb is about 6 months—in March 2015.

Additionally, Caleb will need to be recertified around the time he turns one year of age—at the end of August 2015. You could put his recertification appointment in late August. Connie will not be recertified because a breastfeeding mother can only participate on WIC until her infant is one year old.

Let's Practice

Connie Celery Group

Connie Celery
DOB: 08/23/2014, 1 Months
WIC: Active 1
Cert. Period: 09/05/2014
Priority: 2

Caleb Celery
DOB: 01/02/1995
WIC: Category 08
Exp. End: 07/31/2015

Caleb
DOB: 08/23/2014
WIC: Category 1
Exp. End: 8/31/2015

Month	Connie	Caleb
March, 2014	New Certification	
April, 2014		
May, 2014	Nutrition Ed +	
June, 2014		
July, 2014	Check Pickup	
August, 2014		
September, 2014	Recertification	New Certification
October, 2014		
November, 2014		
December, 2014	Nutrition Ed Individual	Nutrition Ed Individual
January, 2015		
February, 2015		
March, 2015	Mid-Certification	Mid-Certification
April, 2015		
May, 2015		
June, 2015	Nutrition Ed +	Nutrition Ed +
July, 2015		
August, 2015		Recertification
September, 2015		

Kansas -
Department of Health and Environment

Our Mission: To protect and improve the health and environment of all Kansans.

You know that Connie and Caleb will also need some nutrition education contacts—one between their certification and midcertification visit and another after the midcertification and before Caleb turns one in August. On our example shown here, we set up an individual nutrition education contact for December for both mother and baby. That will allow the WIC staff to work with mom on any breastfeeding issues as well as provide some anticipatory guidance on infant feeding. You could have also made this appointment for a class, or NE+ with an appropriate topic for the family.

In June, we set up an NE+ appointment for an interactive display about healthy meals and snacks for the whole family. Again, you may have chosen to set up a NEI in place of this appointment type.

Let's Practice

The screenshot shows a WIC Client Services software interface. The top menu bar includes 'File', 'Services', 'Client', 'Check In/Out', 'Client Admin', 'Utilities', 'Reports', and 'Help'. The main window is titled 'Connie Celery Group'. On the left, there's a sidebar with 'Group Members' (Connie Celery, Caleb Celery) and 'Quick Links for Caleb Celery' (Demographics, Flowsheet, Notes, WIC Certification, Mid-Certification, Dual Participation, Address Measures, Blood Measures, Health Interview, Risk Factors, Nutrition Education, Referrals, Immunizations, History-Client Goals, History-Health Interview, History-Insurance, History-Nutrition Education, Rights & Responsibilities, Check Pickup, Sign for Checks). The main area displays a calendar view for 'Caleb Celery' (DOB: 08/23/2014, 1 Month). The calendar shows appointment slots for various services: 'New Certification' (March 2014), 'Nutrition Ed' (April, May, June, July, August, September, October, November, December 2014, January, February 2015), 'Check Pickup' (July 2014), 'Recertification' (August, September, October, November, December 2014, January, February 2015), and 'Breastfeeding Peer C' (October 2014). A red arrow points to the 'Breastfeeding Peer C' slot for October 2014.

Our Mission: To protect and improve the health and environment of all Kansans.



While no other appointments are required in order to complete the flowsheet for the Celery family, you could potentially add other items to their plan of care as appropriate. Some local agencies regularly schedule their new moms and babies into an appointment in about a month after they are first certified on WIC.

For instance, on this slide, we added an appointment with the Breastfeeding Peer Counselor a month after Connie and Caleb were certified. This would allow for the family to meet with the counselor and have face-to-face support for their breastfeeding efforts. Remember that appointments with the breastfeeding peer counselor do not “count” as nutrition education contacts.

So how did you do? Did your plan of care look similar to the one on the slide? Keep practicing and each time you set up a flowsheet, it will become easier.

Questions and Answers

Q: The client missed their recertification appointment in March and came in April. I had a recertification on the flowsheet for March—what do I do?

A: At the recertification in April, put the recertification on the flowsheet in April and plan the rest of the certification period from April. It is OK to update the flowsheet, if needed.

Our Mission: To protect and improve the health and environment of all Kansans.



Often there are questions about how to use the flowsheet and when it can be adjusted. Here are a few of the most frequently asked questions:

Remember that the Flowsheet is a Plan of Care but not written in stone. It can be changed as needed. If a client misses an appointment, just go ahead and adjust the flowsheet to reflect the most current circumstances.

Questions and Answers

Q: Johnny was high risk for a low hemoglobin when he was certified and was scheduled for two high risk contacts after his certification. At the first RD visit, a repeat hemoglobin shows that Johnny's iron is within normal limits. Do I still have to schedule an RD visit at the next nutrition ed. visit?

A: No. You can change the flowsheet to make the next visit an NEI or NE+ visit if the high risk condition is resolved. Add a note to KWIC that shows the high risk condition is resolved.

Our Mission: To protect and improve the health and environment of all Kansans.



So can you change the flowsheet if the risk level changes? Absolutely! If a client is identified as high risk at their certification, the initial flowsheet should show high risk nutrition education contacts scheduled for the entire certification period.

However, if at the first RD visit, it is found that the high risk condition has resolved, you can change the flowsheet. Instead of scheduling a second RD visit, it is fine to change the flowsheet and schedule the client into an NEI or NE+ appointment. Be sure a Note is added to the client's KWIC record that documents that the high risk condition has been resolved. It is also a good practice to review the client's risk factors. While you can't remove any risk factors previously assigned, you may find that other risk factors need to be added.

Questions and Answers

Q: I just finished a certification for a client who did not bring in all her proofs. Do I just plan the flowsheet for one month until she brings her proof?

A: No. Set up the flowsheet for the client for the entire certification period. If the client fails to bring her proofs in the 30 day period, and you have to repeat the certification, you can adjust the flowsheet at that time.

Our Mission: To protect and improve the health and environment of all Kansans.



If a client is certified and forgets to bring in one or more of the required proofs (ID, proof of residency or income), the KWIC system only certifies the client for 30 days until the proofs are provided. When the flowsheet opens in KWIC, only one line will be shown. Use the “Add” button to add enough lines to reach the end of the normal certification period, and complete the flowsheet to the end of that period as expected.

If the client fails to bring the proof within 30 days and has to be recertified, the flowsheet can be adjusted accordingly.

Questions and Answers

Q: How do I decide how many months of checks to give the family?

A: Check the flowsheet! Print only enough checks to get the family to their next planned appointment.

Example: If it is two months until the next scheduled appointment on the flowsheet-only print two months of checks and make the next appointment to come back in two months.

Our Mission: To protect and improve the health and environment of all Kansans.



The WIC checks are often the incentive to get families to return for low risk or high risk nutrition education appointments. Use this to your advantage. Only issue enough checks to get the family up to their next appointment. You can make the appointment and remind the family that they will receive more checks when they come to that appointment.

Questions and Answers

Q: I certified the client and set up their flowsheet. Now mom has called and wants to change the baby's formula. Do I need to redo the flowsheet?

A: Maybe. If you make an appointment for mom to come for a follow up visit to change the formula, you do not need to add this to the flowsheet. However, if the baby has an issue that changes their risk condition, you may need to assess the plan of care you made on the flowsheet.

Our Mission: To protect and improve the health and environment of all Kansans.



It is not unusual for infants to change the type of formula they are getting from WIC. When mom contacts the clinic asking for a formula change, your clinic may make an appointment for her to come in and talk to staff about the needed change. It is not necessary to put this appointment in the flowsheet. However, if during the discussion with mom, a health or nutrition issue is identified that would change the infant from low nutritional risk to high risk, you should adjust your plan of care on the flowsheet accordingly. Be sure to make a note in the baby's KWIC record indicating why the change in risk level has occurred and add any additional risk factors that may have been identified.

Questions and Answers

Q: I certified mom as breastfeeding and set up her flowsheet for a full year. Now she has stopped breastfeeding. What do I do?

A: Change the flowsheet. Adjust the plan of care for the remaining postpartum certification period and remove any appointments that are no longer required off the flowsheet.

Our Mission: To protect and improve the health and environment of all Kansans.



When a plan of care is developed for a client, it is done using the most current information about the category and risk of the client. If mom is breastfeeding at her certification, the flowsheet is completed anticipating that she will continue breastfeeding until the baby's first birthday.

If mom ceases breastfeeding before the end of one year, you can adjust the flowsheet to reflect this new information. If the baby is not yet 6 months old, the mother's category would change to postpartum and she would receive WIC benefits for the remaining months until she reaches 6 months post delivery. The flowsheet should be adjusted to delete the midcertification and any additional nutrition education appointments after the six month.

If mom ceases breastfeeding after 6 months, she would be terminated from the WIC program and any remaining contacts scheduled on the flowsheet could be deleted.

Questions and Answers

Q: Mom has three children on the program and she does not want to bring them all in at the same time. Is that allowed or do I have to coordinate their flowsheets and appointments?

A: You can grant the mother's request. Adjust the flowsheet to let mom bring only one or more of the children to a given appointment. Try to coordinate appointments where the children do not need to be present to limit the number of times mom returns to your clinic

Our Mission: To protect and improve the health and environment of all Kansans.



Sometimes mothers may request that you NOT coordinate all the appointment for a family. Because of transportation, child care issues or other reasons, some mothers may prefer to come to the clinic more often and bring only one or two children. Feel free to work with the mother to set up the flowsheet to meet her special needs. If there are appointments where the child does not need to be present (NE+ or NEI, for instance), set up that appointment to coordinate with as many other family members visits as possible. You may wish to make a note in the family's KWIC record indicating mother's preference for separate appointments for the children so other staff will know.

Questions and Answers

Q: I'm confused, what do I do with the flowsheet when someone transfers from in-state or out-of-state?

A: Great question! Be sure to update or complete the flowsheet from the client's current certification date to their next recertification date. Transfers just like all clients must have a plan of care. Completion of the flowsheet ensures that the client receives timely nutrition education and certification appointments.

Our Mission: To protect and improve the health and environment of all Kansans.



Clinics should determine who is responsible for completing the flowsheet for clients who transfer into the clinic. Clerks frequently complete the transfer and may not be comfortable completing the flowsheet – make a plan for your clinic.

Questions—Need More Practice?



Our Mission: To protect and improve the health and environment of all Kansans.



If you still have questions, or you need more practice, the State WIC office will be glad to set up a training database account for you. Have your supervisor email: wicstaffchange@kdheks.gov and ask for a training account. You can practice setting up and changing flowsheets to improve your skill and confidence in using this tool in your own clinic.



www.kdheks.gov

Our Mission: To protect and improve the health and environment of all Kansans.

For more information, contact your assigned State WIC staff member.